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AUTHOR Worth, Walter H.
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ABSTRACT

This paper discusses the development of educational planning processes in Canada. The first of the three topics addressed is change in eight characteristics of planning between 1956 and 1986: (1) the locus of planning, (2) the vehicle for planning, (3) the educational level on which planning focused, (4) the scope of planning, (5) the time frame involved, (6) preferences for qualitative or quantitative improvement, (7) the number of participants in the process, and (8) the extent to which technological advancement has affected planning. The second topic concerns factors associated with success; it is suggested that six factors are associated with the success of planning efforts: (1) the power of the sponsor, (2) the continued presence of an important advocate, (3) the continued visibility of the planning effort itself, (4) the specificity of the course of action advocated, (5) the packaging and marketing of the plan, and (6) the timing of the plan. The third topic concerns recent insights about planning; in this final section, the paper reflects on the confluence of interest in the organizational nature of schools and in contingency planning. The extent to which goals are agreed on and technology clearly established identify planning efforts as focused on programing (that is, applying knowledge rationally), learning, bargaining, or searching. (PGD)

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LEARNING TO PLAN FOR LEARNING

Dr. Walter H. Worth
University of Alberta

23 April 1986

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LEARNING TO PLAN FOR LEARNING

Imagine encountering an educational system in which goals are clear and agreed, and the means for their achievement known and available. In these circumstances there would be no uncertainty, no conflict, no scarcity and no politics. Planning would be unnecessary.

If we found such a system, we would likely think that we had died and gone to Heaven.

Where we live and work the reverse conditions usually prevail. Goals are vague and varied. They are often in dispute or competition. How to achieve them is frequently a matter of doubt and debate. Resources are in short supply and, as with all other scarce goods, the distribution of education is accomplished through political means. Within this volatile context, planning is imperative in order to define and deliver what is deemed to be good education for Alberta's children.

What are we learning about planning for learning? This presentation seeks a partial answer by offering a developmental perspective on planning endeavors in Canadian education.The way in which salient characteristics of the planning process have changed over time will be identified along with some of the conditions influencing the direction of these changes.Then a few of the factors associated with the success of past planning efforts will be noted. Finally, certain recent insights about the nature of planning in organizations for schooling and what might work will be elaborated. The source of this perspective is personal experience and reflection, buttressed occasionally by reference to the professional literature.

CHANGING CHARACTERISTICS OF PLANNING

Planning in Canadian education may be described in terms of eight characteristics which have altered in application over the years in accord with changing circumstances. These characteristics and the direction of change in each of them from 1956 to 1986 are shown in Figure 1.

The *locus* of planning has moved from being predominantly a provincial responsibility to one which the province shares with local jurisdictions. This sharing occurs within a framework of policies and expectations set by the province. Alberta's Management and Finance Plan (1984) is illustrative of this phenomenon. Among the conditions influencing modifications in locus and in framework have been the growth in size and competence of local jurisdictions, the state of the economy and the ascendancy of the participation-ethic. Yesterday's politics of affluence favored decentralization, while today's politics of scarcity favors centralization. However, the see-saw remains tilted for the moment toward district and school responsibility in planning, particularly insofar as implementation is concerned. The "non-systems approach" to be described this afternoon by Alan Newberry illustrates this very well.

The earlier dominance of the province becomes apparent in the major *vehicle* used for planning. It was the royal commission. Examples abound: Manitoba (1959), Alberta (1959), British Columbia (1960), Quebec (1966), Newfoundland (1968), Ontario (1968). Some provinces had another royal commission about a decade later: Alberta (1972), Ontario (1972). But about this same time, the advisory committee, task force or study group began to appear in places like Saskatchewan (1972), Lethbridge (1973), Manitoba (1973), and British Columbia (1974). Before long it became the principal means for planning at both the provincial and local levels. Witness Ontario (1981), Alberta (1981), Northwest Territories (1982), Vancouver (1982), Manitoba

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Opening address by Dr. Walter H. Worth, Professor of Educational Administration, University of Alberta to the Annual Joint Conference of Alberta School Superintendents and Alberta Education in Edmonton on April 23, 1986.

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PLANNING CHARACTERISTICS	DIRECTION OF CHANGE 1956 from <----------> 1986 to				
LOCUS	provincial	>			provincial+local
VEHICLE	commission	>			advisory committee
LEVEL	basic	>	higher + further	>	early + basic
SCOPE	comprehensive	>			confined
TIME HORIZON	medium + long term	>			short + medium term
FOCUS	quantitative	>			qualitative
ACTORS	few	>			many
TECHNOLOGY	limited	>			expanding

Figure 1. Directions of Change in Planning Characteristics

(1983), Saskatchewan (1984a). The popularity of the advisory committee probably relates to its capacity to produce solutions to specific problems in a turbulent environment in a brief period of time; its potential to gain the participation of those affected and involved; and the ability of the sponsor to influence its work and the implementation of outcomes.

How attention has shifted from one *level* of education to another is clearly revealed in the mandates given commissions and advisory committees. Initial preoccupation with basic education (Manitoba, 1959; Alberta, 1959; British Columbia, 1960) gave way to concern about higher and further education (Alberta, 1972; Ontario, 1972; Manitoba, 1973; Nova Scotia, 1974) before returning to basic education, including early education (Quebec, 1979; Newfoundland, 1981; Ontario, 1983; Saskatchewan, 1984a). Change in the level attended to reflects populaton movements through the system as well as social and economic demand, particularly from women.

The *scope* of planning has narrowed. Comprehensiveness, which reached its zenith with A Choice of Futures (Alberta, 1972), has been succeeded by more confined endeavors typified by the secondary school reviews in Quebec (1979), Ontario (1981) and Alberta (1984a). Often the scope is even narrower concentrating on finance (Nova Scotia, 1981) or counselling and guidance (Alberta, 1981) or computers (Prince Edward Island, 1983) or teacher workload (Newfoundland, 1984). Confining the scope of planning appears to be a response to uncertainty and complexity in a depressed economy and unstable environment.

Similarly, the *time horizon* has been reduced and for the same reasons. More shorter term exercises like those just cited (Nova Scotia, 1981; Alberta, 1981; Prince Edward Island, 1983; Newfoundland, 1984) are now in evidence in contrast to longer term ventures a decade earlier in Quebec (1966), Ontario (1972), Alberta (1972) and New Brunswick (1973).

Emphasis on quantitative expansion, as exemplified by the early commissions, has been supplanted as the *focus* of planning efforts by a desire for qualitative improvement. Living and Learning (Ontario, 1968) gave impetus to this trend which is also evident in more recent planning reports like Directions (Saskatchewan, 1984a) and Secondary Education in Alberta (1985) The search for qualitative improvement may be interpreted as an expression of the self-actualization theme in our society. However, much of its current support also stems from those who view efficiency as a means for attaining the end of effectiveness.

As the locus, vehicle, scope and focus of planning altered, more *actors* have had an opportunity to participate. Witness the Partners in Education (1985) exercise. Elitism is being displaced by pluralism. Former bit players are vying for starring roles. The growing professionalization of the teaching force has given them aspirations and qualifications for stardom. Special interest groups have had their role enhanced by Sections 15 and 23 of the Constitutional Act of 1982 (Charter of Rights), which is one of the legislative changes affecting children that Anne McLellan will be discussing later in the Conference. Individual parents and electors are at least attaining the status of "extras" through the use of public opinion polls and activities leading to reports like What They Said (Saskatchewan, 1984b) and Let's Talk About Schools (British Columbia, 1985). However, there is some evidence that this participatory trend is ending or bending. Centralism may be gaining strength (Canadian Association for the Study of Educational Administration, 1984; Common, 1985, p.150) and political elites expanding their influence (Fennell, 1985).

Advances in the *technology* of planning have resulted in a steady improvement in both the quality and the quantity of information available to decision-makers. This improvement can be readily discerned by comparing the information base of an early commission, for example, Manitoba (1959), with that of the Review of Secondary Programs (Alberta, 1984a) or Let's Talk

About Schools (British Columbia, 1985). Although more technocratic guidance in the analysis of problems and the legitimation of solutions is available now than in the past, planning remains fundamentally political in nature. Consequently logic and fact, even when supplemented by extensive diplomacy, do not always emerge triumphant over power, guile and expediency.

FACTORS ASSOCIATED WITH SUCCESS

It can be argued that all of the planning activities in Canadian education have been successful. For someone, or something, each has made a difference. The activity may have increased the knowledge or altered the attitudes of those who participated; it may have influenced a policy decision of the sponsor; it may have modified the content or delivery of a particular service or program; it may have encouraged a teacher or administrator to behave differently with a student or a colleague; it may have led to a student learning a new skill or concept; it may have given a parent the impression that something was being done about a problem; it may have enabled an elected official to defuse an explosive situation. In addition to providing a rationale for justifying the worst of our planning efforts, this kind of argument illustrates the difficulty we have in agreeing upon criteria for determining success or failure.

Setting aside this somewhat academic debate, it is apparent that some planning endeavors have had more impact on educational policy and practice than others. Whether they merely anticipated an inevitable change or actually induced the change may be debatable, but that change occurred is not arguable. Examination of a few major planning ventures suggests that certain factors, often in interaction, were associated with their relative degree of success or impact. A brief elaboration of six of these factors follows.

To begin with a *powerful sponsor* is needed. That there is none stronger than government is clearly demonstrated in the success of many commissions. For example, Sheffield (1978) claims that the majority of 22 important changes in Canadian higher educaton which took place between 1951 and 1978 were brought about as a consequence of commissions of inquiry. A more recent reminder of the power of government as sponsor is to be found in the establishment of the Council on Alberta Teaching Standards in 1985. Similarly, the crucial role of the superintendent (Fullan, 1982, p.45) and the principal (Fullan, 1985) as sponsor at the district and school levels is well-documented as Tony Riffel will show us later today. One of the reasons the OECD review (1976) had relatively little impact was that its sponsor, the Council of Ministers of Education, had no legislative authority. Likewise, the force of many of the recommendations of the Kratzmann commission (Alberta, 1980) was lost because they required action by the Minister of Education who did not take kindly to the intrusion on his jurisdiction by an initiative sponsored by the Minister of Labour.

A *continuing advocate* also helps to maximize impact. Lloyd Dennis, the co-chairman of the commission which produced Living and Learning (Ontario, 1968), is well-known in this role. The popularity and influence of the document in Ontario and elsewhere was, in large measure, due to his promotional activities. It is even more useful if the promoter exercises his advocacy from within government. This happened in Ontario (1972) and Alberta (1972) where the commission chairmen became deputy ministers. In the latter case, the commission's proposals for advanced education, where the former chairman was then deputy minister, fared much better than those related the interests of the education department. It happened again in Alberta when the author of Theory to Practice (Alberta, 1981a) became deputy minister of education and was in a position to encourage the Initiation to Teaching Project (1985). The value of lobbying and linkage with elected officials was also judged to be a significant factor in the success of the Carnegie Commission in the United States (Longanecker and Klein, 1977). Plan implementation at the local level is equally dependent on how senior administrators react. If they take the plan seriously and evidence

commitment to it, then the odds are in favor of implementation. If they do not, then forget it. (Fullan, 1982, p.165).

Maintaining visibility during the planning exercise is a further ingredient of success. In addition to providing reassurance that something is being done about a problem, it helps to create readiness for the eventual plan or proposal. Recurring publicity also helps to keep an issue alive when the political pressures of the day signal that the problem may be buried among a lot of seemingly more urgent issues. Moreover, conspicuousness can assist in derailing ill-advised quick-fix solutions. Activities for the maintenance of visibility can be carefully planned like those of some commissions (Alberta, 1972; Ontario, 1972) or more recent committees (Saskatchewan, 1984a; British Columbia, 1985). Valuable visibility is sometimes obtained by accident. For example, the Commission on Educational Planning in Alberta (1972) achieved extensive media coverage arising from the dismissal of a commission board member as well as from a prediction in one of its research studies that the Social Credit government, which had established the commission, would be defeated in the next election.

Additionally, *specificity* in the course of action to be followed increases the likelihood of impact. For each problem identified in the influential Living and Learning report (Ontario, 1968) a solution was recommended and the agency or group responsible for action was indicated. What A Choice of Futures (Alberta, 1972) highlighted as its top-ten proposals were much easier for policy-makers to come to grips with than the more than two hundred others woven into the body of the report. The rare use of the "comprehensive examinations" made available by Alberta Education a few years ago was a direct result of the lack of precision in the plan. Fullan (1982, p.294) is right: abstraction and vagueness are the bane of implementation.

The *packaging and marketing* of a plan can have substantial impact. After reviewing a number of commission reports, Ahamad (1980) concluded that some were more influential than others because of presentation and promotion rather than quality. The benefits which accrued from the colorful and different packaging of the Ontario (1968) and Alberta (1972) commission reports were not overlooked by the Minister's Advisory Committee on Curriculum and Instruction Review in Saskatchewan (1984a) or by the Provincial School Review Committee in British Columbia (1985). The attractive and functional way in which their reports have been presented augers well for their ability to affect policy and practice. Among the more efficient and effective -- and certainly the most unusual -- marketing strategy in Canadian education was that related to A Choice of Futures (Alberta, 1972). A "reader's companion" drawing attention to selected features of the report and urging its purchase was distributed free of charge to every household in the province. A film about the report was produced for free loan to associations, organizations and groups. The report itself was sold in Safeway supermarkets and its sale promoted as a public service by Safeway in its newspaper, radio, television and in-store advertising.

Finally, the criticial importance of *timing* should not be ignored. Living and Learning (Ontario, 1968) prospered because its central theme -- "the truth shall make you free" -- was in harmony with the mood of the times. By contrast, A Choice of Futures (Alberta, 1972) suffered from being conceived and developed in an era of permissiveness and liberalization, but having to be implemented at a time when a conservative back-lash was emerging. A similar fate befell A System in Conflict (Alberta, 1980) whose 20/20 vision was obscured by a sudden and serious downturn in the provincial economy. How the economic, political or social climate can also catapult a planning document into prominence can be seen in the Committee on Tolerance and Understanding (Alberta, 1984b), and Let's Talk About Schools (British Columbia, 1985) and the Report of the Task Force on Child Care (1986).

TYPE A		TYPE C	
Goal	*AGREED*	Goal	*NOT AGREED*
Technology	*KNOWN*	Technology	*KNOWN*
Response	*PROGRAMMING*	Response	*BARGAINING*

TYPE B		TYPE D	
Goal	*AGREED*	Goal	*NOT AGREED*
Technology	*UNKNOWN*	Technology	*UNKNOWN*
Response	*LEARNING*	Response	*SEARCHING*

ORGANIZATIONAL IMAGES

BUREAUCRATIC <----------> ANARCHIC

Figure 2. Prototype Planning Conditions and Organizational Images

RECENT INSIGHTS

Other insights about planning in organizations for schooling are emerging from the confluence of two streams of thought. One stream relates to the organizational nature of schools and schools systems (Allison, 1983). Two different images of schools are receiving substantial attention: the classic image of the *rational bureaucracy* and, at the other end of the continuum, the image of the school as an *anarchy* or loosely coupled system (Firestone and Herriott, 1982). The other stream of thought deals with contingency planning (Christensen, 1985). Great importance is attached to matching planning processes to problem characteristics. Being able to recognize and address uncertainty is viewed as the central task of planning. The conjunctive consideration of these streams of thought which follows is intended to offer some suggestions for coping with a major dilemma facing school superintendents: "how to deal with current and emergent issues while still endeavoring to plan for long-range issues" (Duignan, 1980, p.18).

Four prototype variations of conditions that can characterize planning are shown in Figure 2 -- *type A:* agreed goal, known technology; *type B:* agreed goal, unknown technology; *type C:* no agreed goal, known technology; *type D:* no agreed goal, unknown technology. These planning problem conditions correspond to differences in the organizational features of schools and school systems. Type A planning is compatible with the bureaucratic image, while type D planning fits the anarchic image. Type B also tends toward the bureaucratic, just as type C tends toward the anarchic.

When people agree on what they want and how to achieve it as in type A planning, then certainty prevails. Planning is a rational application of knowledge through *programming*. Conditions of agreed goal and known technology in education often go unnoticed because of effective planning routines. For example, we regularly build schools, arrange pupil transportation, deploy personnel, develop instructional materials, select textbooks and prepare student achievement tests in response to an agreed need for them.

Type B planning is a *learning* process. It arises when there is a commitment to address pressing problems for which there are no proven solutions. To illustrate: an agreed goal may be to provide better schooling for native children to help improve their life-chances. While there are many opinions about how this should be done, there is little evidence which clearly supports one course of action over another. Faced with this kind of uncertainty about the technology, educators usually pursue a best-fit approach in an incremental, trial-and-error fashion. Ralph Sabey will have more to say about this approach in relation to the Native Education Project Fund.

Two features of type A and type B planning should be noted. Both sets of conditions call for the application of specialized knowledge and skill. Therefore, the major participants in planning are quite properly professionals and experts. In each case, public affirmation of the goals flows through elected representatives. Additional public or citizen involvement may seldom be necessary or beneficial. Token participation seldom satisfies (Levin, 1982).

The relative certainty and stability in conditions associated with types A and B enhances the utility of system type concepts and norms of rationality (Willower, 1980). Accordingly, administrators can work through routines, prescription and delegation with the prospect of dependable performance and reliable results. By concnetrating on their monitoring and coordinating functions in type A and B planning, they are then able to find more time for type C and D planning where their leadership talents are critical.

Type C planning represents a situation in which there is uncertainty or conflict over goals, but

where it is known how to achieve alternatives. In these circumstances, planning becomes a *bargaining* process. Planning for retrenchment or restraint falls in this category. There are multiple and diverse preferences about which programs and services to eliminate, schools to close and personnel to terminate. Developing and adopting a plan to reduce expenditures that accommodates differences in preferences and minimizes conflict is the major hurdle. Thereafter, known procedures for implementation are customarily followed.

When there are multiple or unarticulated goals and no known means for achieving them, then type D planning conditions exist. Planning is a process of *searching* . Long range planning is like this. It usually seeks to base priority judgments about schooling on the future nature of society and the needs of individuals in that society. A fundamental planning task is to establish order to guide the endeavor and to inspire confidence in the outcomes. Frequently, this is done by focussing on goal clarification activities and/or on the identification of plausible, workable technologies. On Friday morning when Reno Bosetti talks about how "Alberta Education responds" he will be describing a lot of type D planning.

To describe type C and D planning conditions, is to also describe the characteristics of organized anarchies or loosely coupled systems -- ambiguous goals, unclear technology, fluid participation and dispersed influence. Both are perhaps best comprehended through the use of a garbage can model of decision-making (Willower, 1980). These planning and organizational similarities highlight the significance of problem definition and of participation/representation.

Problem definition or articulation elicits order and meaning from ambiguity. When the process results in agreement about what the problem is, the participants can then focus on the technical aspects of how to solve it -- type B planning. When problem definition results in agreement about which solutions are open to choice, the participants can focus on accommodating multiple goals -- type C planning. In both instances, the way in which the problem is articulated by those in leadership roles must be compelling enough and intelligible enough to provide motivation for attempts at resolution. This capacity for effective problem definition is an aspect of "leadership for tomorrow" which Dante Lupini will highlight on Friday.

The search for order requires understanding of political forces and preferences as well as knowledge about the problems and related technologies. Thus, type C and D planning is where interest group representation and involvement becomes crucial. Although expanding participation beyond the professionals will increase conflict, delay agreement and slow planning, it will also maximize the information available in the planning process, thereby integrating rationality and responsiveness (Kweit and Kweit, 1984).

Perhaps the key suggestion about what might work in planning arising from the foregoing is for administrators to engage in more of what Cameron (1984) refers to as *Janusian thinking* (which is not unlike the "creative synthesis" which Reno Bosetti often talks about). Such thought processes derive their name from the Roman god Janus who had two faces which enabled him to look in different directions at the same time. Janusian thinking occurs when two contradictory concepts are held to be true simultaneously -- for example, bureaucratic and anarchic images of the school. The explanation or resolution of the apparent contradiction is what leads to major breakthroughs in insight. Thinking that two opposites may both be valid at the same time engenders the flexibility which is a prerequisite for creativity and effective problem solving Janusian organizations exhibit similar flexibility and adaptability. They exploit seemingly contradictory characteristics simultaneously to respond to changing and different demands -- for example, loose coupling to initiate innovation; tight coupling for implementing innovation.

A CONCLUDING OBSERVATION

The experience of the last thirty years confirms that in planning education Albertans and other Canadians have been realistic idealists. We have pursued noble goals in a pragmatic fashion.

We have frequently re-affirmed that schooling ought to nurture intellectual power, personal autonomy, social competence, ethical discretion, creative capacity and career proficiency. By our actions we have shown that reaching this ideal means doing the possible -- a step, a jump, a leap at a time -- and doing it at the first opportunity.

This legacy of optimism and action must also guide our future planning efforts. For optimism and action supply the basic energy of civilization. Neither waits on slowly-assembled facts. Each deals with prospects. Both rely on consent and creativity. Any other stance is a waste of critical time.

And for each of us, as for every child now in school and those to come, *time is the ultimate non-renewable resource.*. For tomorrow's schooling to be even better than today's, we dare not squander any of it.